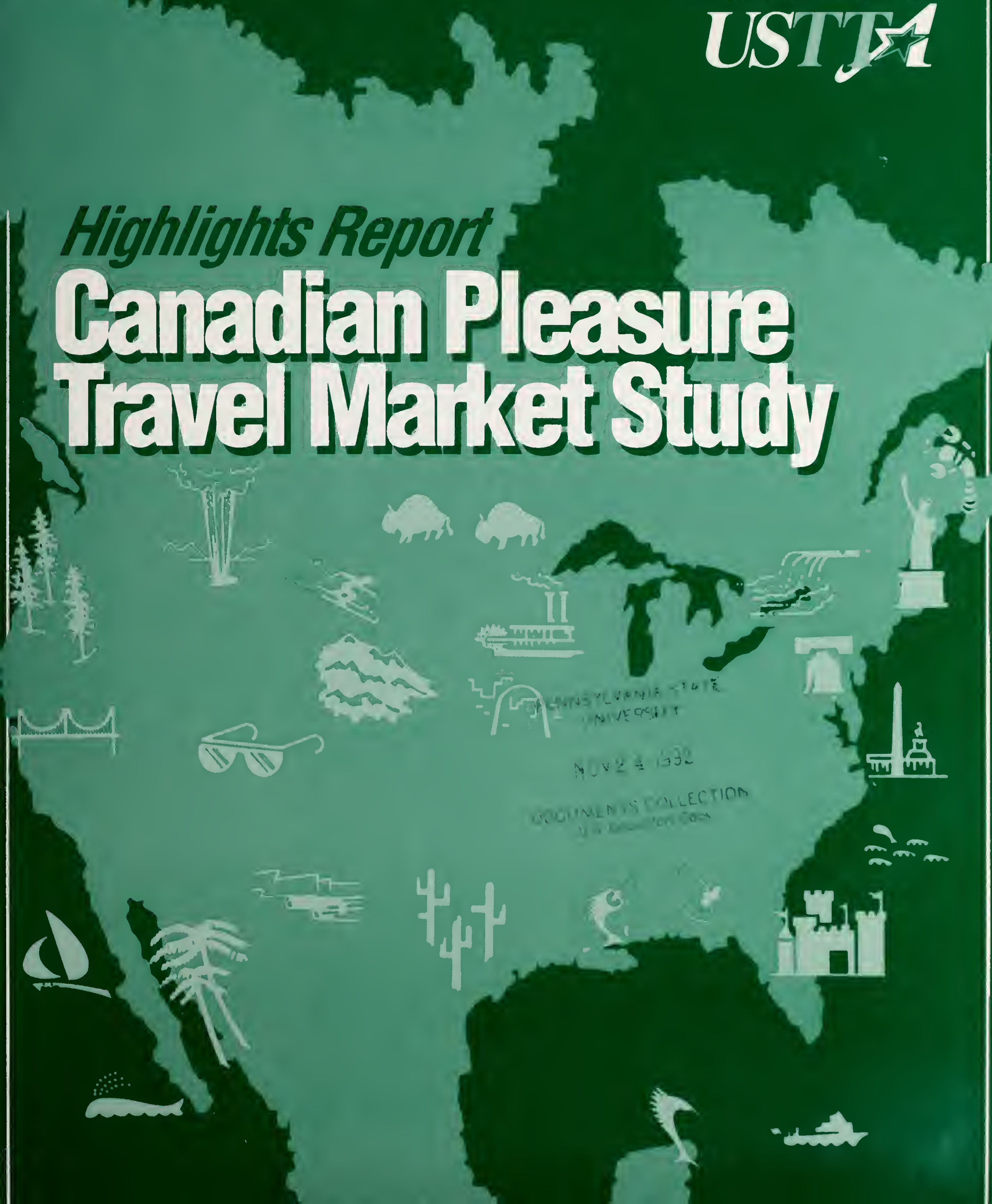
U.S. Department of Commerce
United States Travel and Tourism Administration
USTTA

Highlights Report

Canadian Pleasure Travel Market Study



PLEASURE TRAVEL MARKETS TO NORTH AMERICA

CANADA

Highlights Report

Prepared for:

UNITED STATES DEPARTMENT OF COMMERCE

UNITED STATES TRAVEL AND TOURISM ADMINISTRATION

By:

ANGUS REID GROUP, INC.

July 1992

THIS RESEARCH WAS CONDUCTED ON BEHALF OF THE UNITED STATES TRAVEL & TOURISM ADMINISTRATION, SECRETARIA DE TURISMO, MEXICO, TOURISM CANADA, AND THE LAS VEGAS CONVENTION & VISITORS AUTHORITY

BY

ANGUS REID GROUP, INC.

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INTRODUCTION

The United States Travel and Tourism Administration, in partnership with Secretaria de Turismo, Mexico, the Las Vegas Visitors and Convention Authority, and Tourism Canada, commissioned Angus Reid Group to conduct a segmentation study of the Canadian Outbound Pleasure Travel Market in 1991. Under an agreement between the United States Travel and Tourism Administration and Tourism Canada, dating back to 1986, numerous countries have been studied in a similar fashion, including the United Kingdom, France, West Germany, Japan, Hong Kong, Singapore, Switzerland, Italy, Australia, Brazil, Mexico, Venezuela and South Korea.

In previous segmentation studies conducted in the Travel and Tourism sector, the traditional approach has involved segmenting pleasure travellers in three distinct ways: according to their travel philosophy, according to the benefits which they sought in a pleasure travel trip, and according to the interest they expressed in travel products and activities. Angus Reid Group has maintained that the most useful and insightful method of segmentation analysis is to incorporate not only travel philosophy, benefits and products but also actual travel behaviour and more basic psychographic or attitudinal dimensions. Therefore, the Canadian Pleasure Travel Market Study replicates some of the previous segmentation techniques, in that travel philosophy segments, travel benefit segments and travel product segments are identified, but then goes beyond the previous methodology by concentrating upon travel behaviour segments, recent trip activities segments, and finally exploring the market in holistic terms.

This highlights report summarizes a more extensive detailed report, which in turn examines salient features of twelve volumes of data tables. Both the full report and volumes of cross-tabulations are available under separate cover.

The ultimate objective of this research is to provide strategic information for use in market planning with respect to the Canadian pleasure travel market. This strategic information regarding potential tourism from Canada includes:

- an assessment of motivations, benefits and product desires of Canadian Pleasure Travellers;
- an estimation of the size and characteristics of various travel segments within the Canadian public who travelled outside of the country;
- an evaluation of awareness and attitudes towards various U.S. destinations;
- a profile of media habits of key Canadian tourism segments;
- a profile of the demographic and psychographic dimensions of various travel segments.

To provide insightful and actionable information, the **extent** of tourism and the **potential** for tourism to specific destinations and regions within the U.S. is examined for the total Canadian market, as well as the individual travel segments which emerged from this analysis.

METHODOLOGY

The methodology for this project consisted of two major phases of research:

- a telephone survey with 5,850 Canadian adults 18 years of age or older (screened for having travelled outside of Canada within the past three years on a trip three nights or more, or expressing intention to travel outside of Canada in the next two years, and who agreed to participate in the follow-up mail-out portion of the study);

- the methodology for the pre-recruitment telephone survey involved drawing a stratified random probability sample based on population of Canadians by region;

- telephone interviews were conducted on a weekly basis over a nine week period, from August 1991 through September 1991, with 650 interviews being conducted each week;

- the data were computer-weighted by region/province and by major sampling point within that region, to reflect the actual incidence of travelling encountered in the screening process, and to account for the actual population distribution by region according to those incidence figures and Census Canada data;

- a self-completed questionnaire was mailed to all 5,850 contacts, and 3,506 respondents returned completed questionnaires by the specified cut-off date in November, 1991 (60% response rate was achieved after a reminder phone call and a second survey was sent to initial non-responders).

OVERVIEW OF THE CANADIAN MARKET

How large is the target market of Canadian outbound vacation travellers?

The total potential size of the Canadian Outbound Pleasure Travel market is ***13.38 million***, based on an estimated population of 19,968,000 Canadian adults and 67% of Canadian adults contacted having taken a trip for three or more nights outside of Canada in the previous three years or intending to in the next two years. Of this number, ***96%*** express interest in visiting the U.S. specifically, resulting in a total potential pleasure travel population to the U.S. of approximately ***12.84 million*** Canadians.

TABLE 1
CANADIAN MARKET POTENTIAL
INCIDENCE OF OUTBOUND CANADIAN TRAVEL

Total Calls	47,975 100%
Qualified* And Completed	5,850 12%
Qualified* But Refused	26,340 55%
Not Qualified	15,785 33%
Approximate Adult Population In Canada	19,968,000
Incidence of Outbound Travellers	67%
Estimated Total Outbound Travellers	13,378,000
% Potential U.S. Travellers	96%
Estimated Potential U.S. Visitors	12,843,000

* *Qualification: Travelled Outside Canada in past 3 years for 3 or more nights, or intend to in next 2 years for three nights or more.*

Which provinces in Canada generate that volume?

Outbound Canadian pleasure travellers have taken on ***average 4.6 trips*** outside of Canada in the past three years; residents of Western Canada account for a disproportionately higher number of these outbound trips (41% of all outbound trips, 29% of outbound population) compared to Eastern Canadians (59% of all outbound trips, 71% of outbound population).

- British Columbians take the most outbound trips on average (6 trips per year on average);
- Residents of Quebec tend to take fewer trips per year (4.3).

TABLE 2
MARKET SIZE BY PROVINCE

	Proportion of Outbound Travellers	Proportion of Outbound Trips	Average # Trips Taken (Past 3 Years)
TOTAL CANADA	(5850) %	(26,656) %	(4.6)
British Columbia	12	19	6.0
Alberta	9	11	5.5
Manitoba/Saskatchewan	8	11	5.2
Ontario	37	30	5.5
Quebec	25	19	4.3
Atlantic*	9	10	5.1

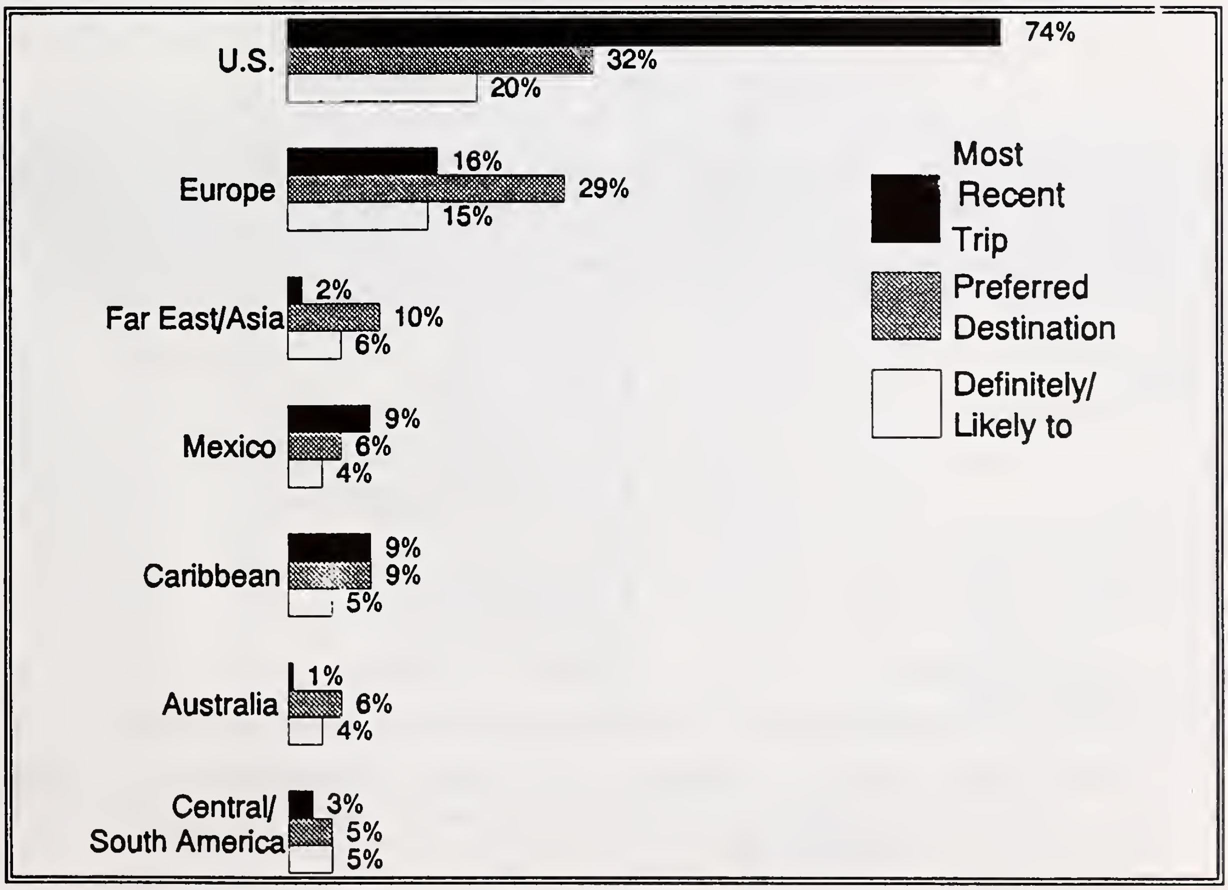
* *Includes Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland.*

Where do travellers go on vacation, and where would they like to go?

Most of the trips recently taken outside of Canada were to the United States (74%). Western Europe is the only other destination receiving over 15% of the Canadian outbound travel market. The U.S. is also the most preferred destination when asked where they would MOST like to visit in the next two years, and is the destination Canadians are most likely visit in the next two years. Other destinations show greater preference than actual or likely visitation - most likely due to distance and cost.

Figure 1

MOST RECENT, MOST PREFERRED & AND LIKELY TO VISIT TRAVEL DESTINATIONS



Over half of all Canadians have visited Census Regions on the eastern and western shores of the United States. The distribution of where Canadians travel is presented by Census Regions and by Tourism Regions (see Table 3). Some Tourism Regions overlap with others, for example, New York is included in the Mid Atlantic region and the Great Lakes region.

- Among the tourism regions, the Great Lakes Region accounts for the largest share of Canadian visitation - dominated by New York State and Pennsylvania. This area is followed closely by the Mid Atlantic, Travel South, Visit U.S. West, and New England.

  The strong draw of the "sun" states such as Florida and California accounts for a great deal of the visitation to Census Regions such as the South Atlantic, and Pacific and the Tourism Regions of Travel South, and Visit U.S. West.

TABLE 3
CANADIAN TRAVEL TO U.S. REGIONS

U.S. Census Regions	Ever Visited %	U.S. Tourism Regions	Ever Visited %
Middle Atlantic	61	Great Lakes	71
South Atlantic	60	Mid Atlantic	67
Pacific	52	Travel South	60
New England	50	Visit U.S. West	57
		New England	50
Mountain	38	Mississippi River Country	30
East North Central	30		
West North Central	18	Foremost West	23
West South Central	14	Old West Trail	21
Islands (Pacific/Atlantic)	11	America's Heartland	5
East South Central	8		

- The Middle Atlantic and South Atlantic are the Census Regions with the greatest level of Canadian visitation. Over 60% of Canadians have visited one of those two regions, while at least half have visited the Pacific and New England.

Looking at U.S. Census Regions visited on the most recent trip to the United States, there is a high North-South correlation of visitation between the Canadian region of origin and the U.S. Census Region visited. Across each of the Canadian provinces, approximately two-thirds of Canadian travellers recently visited a Census Region directly south of them. For example, visitors from British Columbia are most likely to visit the Pacific region, while Ontarians are more likely to visit the Middle or South Atlantic regions. The South Atlantic is a popular destination for all the Eastern Provinces (Ontario, Quebec, Nova Scotia, Newfoundland, Prince Edward Island and New Brunswick), while the Mountain states have high recent visitation from residents of Alberta, Saskatchewan, Manitoba and British Columbia.

TABLE 4
U.S. CENSUS REGION VISITED BY CANADIAN REGION OF ORIGIN
(Most Recent Trip)

U.S. CENSUS REGIONS	Total Outbound (3450) %	B.C. (393) %	Alberta (335) %	Man./ Sask. (300) %	Ontario (1187) %	Quebec (853) %	Atlantic (298) %
Islands	2	5	2	2	2	1	1
Pacific	16	50	30	11	9	9	6
Mountain	11	18	37	20	6	3	4
W.N. Central	7	4	5	38	5	2	2
W.S. Central	2	*	5	3	2	1	1
E.N. Central	7	4	3	9	13	2	4
E.S. Central	2	*	2	1	4	1	2
Middle Atlantic	17	4	5	3	25	22	15
South Atlantic	20	5	7	8	26	28	21
New England	17	10	5	3	10	30	44

* *Denotes less than 0.5% response.*

Many U.S. trips by outbound Canadians were to states bordering Canada (80%). The most frequently visited states are New York and Florida, followed by California and Maine. Among the most common cities ever visited are Boston, Los Angeles, San Francisco and Las Vegas. Combining Orlando and Disney World brings that area up to round out the top five specific destinations.

TABLE 5
PAST CANADIAN TRAVEL TO TOP STATES AND DESTINATIONS

States	Ever Visited (%)	Destinations	Ever Visited (%)
Total U.S.	95	Boston	14
Border U.S.*	80	Los Angeles	13
		San Francisco	12
		Las Vegas	10
New York	57	Miami	7
Florida	53	Washington, D.C.	7
California	41	San Diego	6
Maine	33	Orlando	6
Washington	28		
Massachusetts	23	New Orleans	3
Vermont	20	Disney World	3
Nevada	19	Disneyland	3
Michigan	18	Grand Canyon N.P.	2
New Hampshire	14	(New York City was not	
Hawaii	10	available independent of	
Texas	9	New York State)	

* *One of the states bordering Canada (excluding Alaska) (Washington ..)*

How many Canadians would be interested in travelling to my state/city?

While past experience is an important element in understanding the current situation, in order to identify opportunities it is critical to look at levels of awareness (do travellers think of my area?) and interest (do they want to visit it?). California and Florida are the two leading U.S. states for the Canadian market for both awareness and interest in visiting. Las Vegas and New Orleans are the top cities that come to mind when thinking about vacation destinations. However, San Francisco and Las Vegas show high interest relative to their levels of awareness, indicating possible opportunities as top of mind awareness increases.

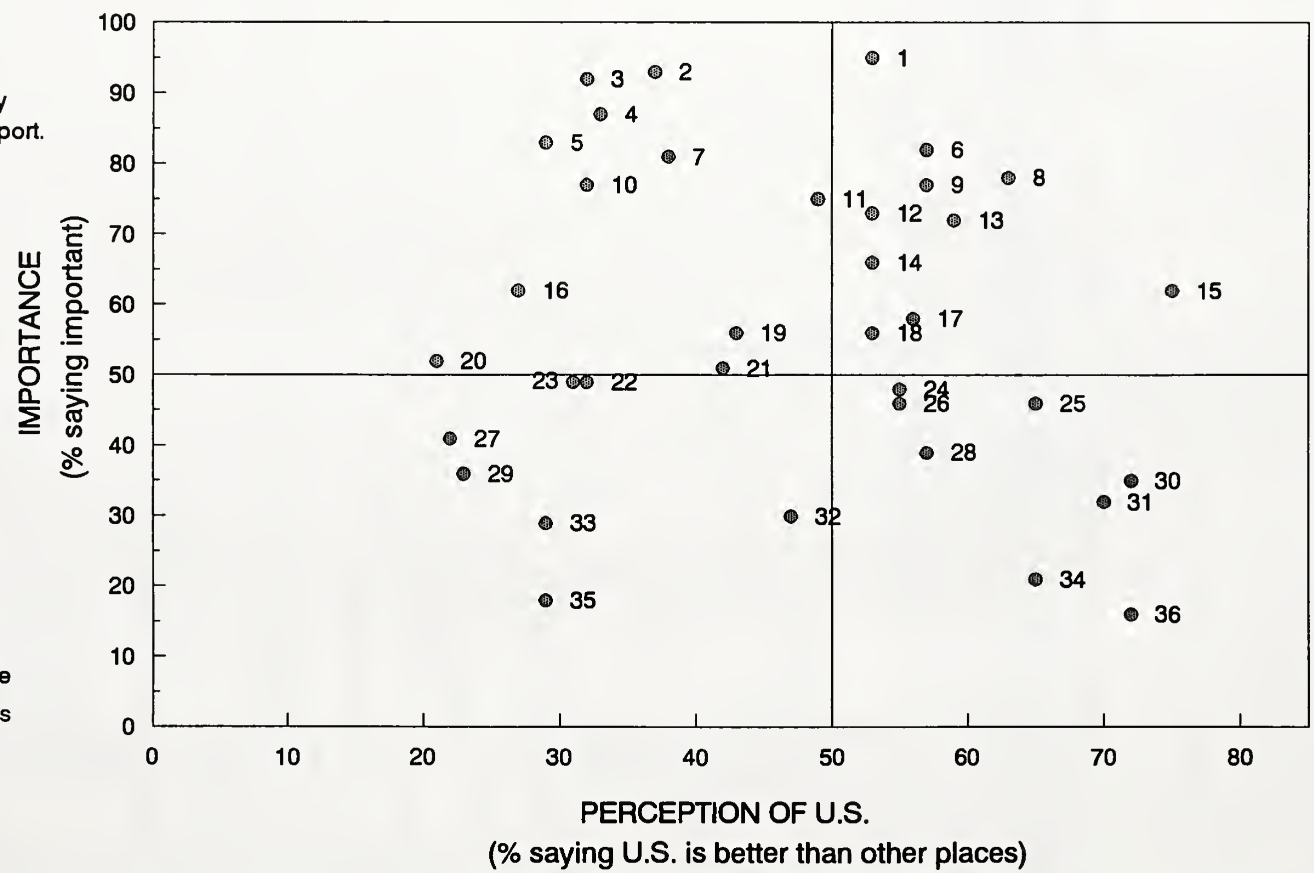
TABLE 6
CANADIAN AWARENESS AND INTEREST IN U.S. DESTINATIONS

	Total Awareness** %	Interested in Visiting*** %
California	91	50
Los Angeles	21	7
San Francisco	19	9
Disneyland	12	*
San Diego	6	*
Florida	90	43
Disney World	13	4
Miami	11	*
Orlando	6	*
New York (NYC N/A)	64	24
Nevada	48	12
Las Vegas	35	8
Texas	37	8
Dallas	2	*
Louisiana	34	11
New Orleans	22	7
Massachusetts	18	10
Boston	14	6
Other Significant States/Cities		
Hawaii	34	16
Maine	22	8
Washington State	21	7
Grand Canyon NP	14	4
Washington, D.C.	4	*

* *Denotes less than 0.5% response.*
** *Aided and unaided mentions of places in U.S. people might visit.*
*** *Top 3 mentions of places in U.S. most interested in visiting.*

FIGURE 2
IMPORTANCE OF TRAVEL ATTRIBUTES VERSUS PERCEPTION OF U.S.
- Total Outbound Travellers -

1. Value for vacation $
2. Outstanding scenery
3. Personal safety
4. Knowledge opport.
5. Friendly locals
6. Inexp. trip in U.S.
7. Clean enviro.
8. Inexp. trip to U.S.
9. Variety to see
10. Escape ordinary
11. Beaches
12. Budget Accom.
13. Good public transport
14. Quality rest.
15. Shopping
16. Seeing wildlife
17. National parks
18. Resort areas



19. Museums
20. Local festivals
21. Historic sites
22. Outdoor activity
23. Adventure opport.
24. Package trips
25. First class hotels
26. Live theatre
27. Native cultural sites
28. Night life
29. Unique native groups
30. Theme parks
31. Fast food resturants
32. Water sports
33. Unique immigrant groups
34. Spectator sports
35. Snow skiing
36. Gaming/gambling

Does the U.S. have any unique selling points?

The opportunities and challenges facing the U.S. in attracting more visitors from Canada can be summarized by relating the importance of various travel attributes with the perception of the U.S. on those same attributes. Figure 2 illustrates important strength areas in the upper right-hand box, showing features which are **important** to travellers and are considered as being **better** in the U.S. than in other places. Important successes which the U.S. can capitalize upon include:

- value for vacation dollar;
- inexpensive travel to and within the United States;
- variety of things to see and do;
- shopping;
- good public transportation.

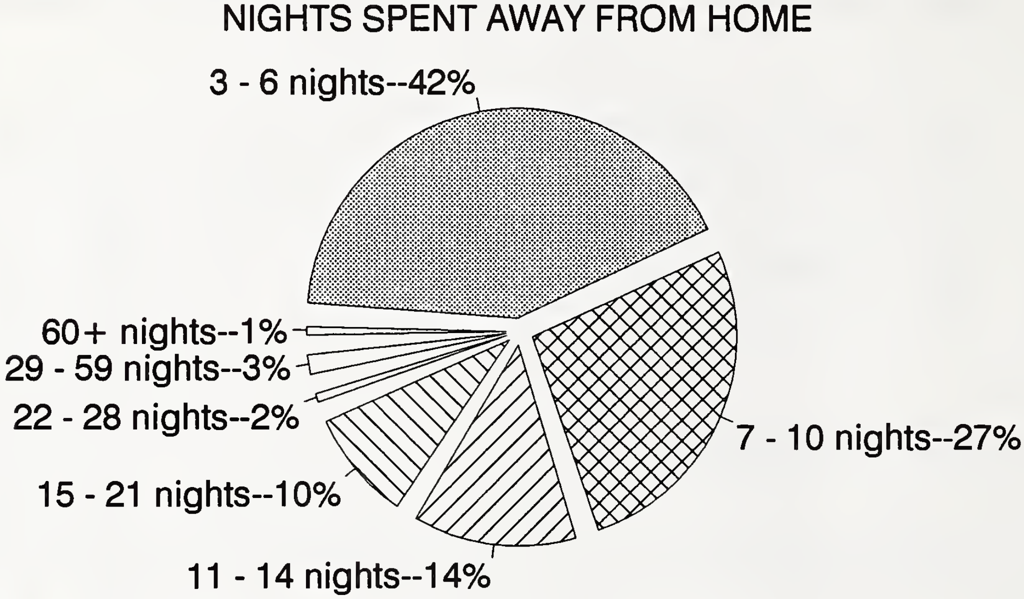
Does the U.S. have any weaknesses?

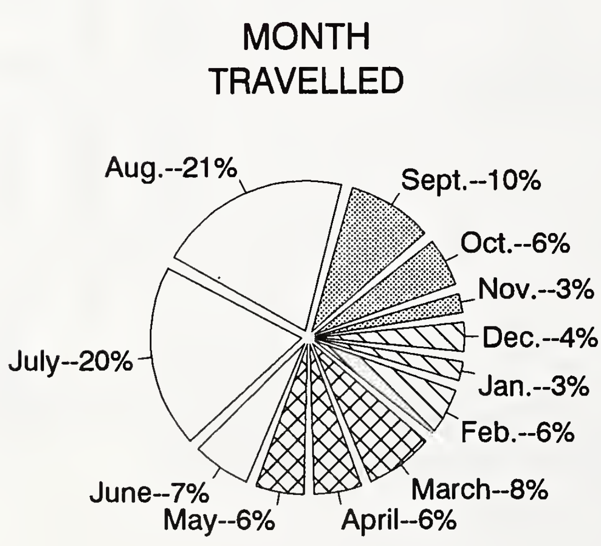
Important travel attributes on which the U.S. is not rated highly (critical weaknesses) are in the top left-hand box of Figure 2. They include:

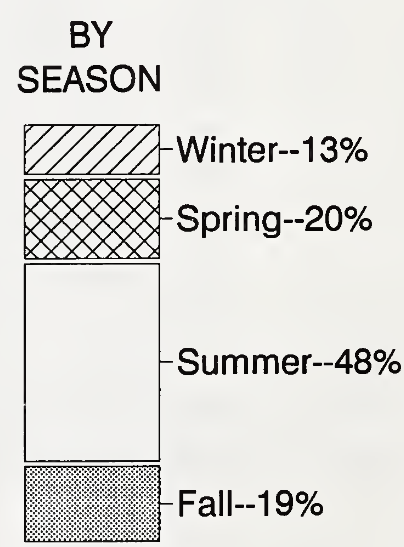
- personal safety;
- outstanding scenery;
- opportunities to increase knowledge;
- a clean environment;
- friendly locals;
- escaping from the ordinary;
- seeing wildlife.

While the U.S. is perceived to be a good value for the vacation dollar, environmental and wilderness related images, as well as concerns about personal safety and the friendliness of locals, are challenges to overcome in marketing the U.S. to Canadian travellers.

FIGURE 3
EXTENT AND TIMING OF MOST RECENT U.S. TRIP







How, why and when are Canadians coming to the United States?

Visiting friends or relatives was the main type of trip taken (63%), followed by resorts (49%), exploring cities (40%), and business/pleasure (28%).

The modes of travel varied somewhat to and within the U.S., however private car was the number one mode of transport, as illustrated below:

TABLE 7
TRANSPORTATION USED ON MOST RECENT TRIP

	TO U.S. %	WITHIN U.S. %
Private Car	50	63
Plane	39	16
Camper/RV	4	6
Bus	4	8
Rental Car	1	22
Train	1	2
Boat	1	4
Public Transportation	*	13

* *Denotes less than 0.5% response.*

Figure 3 shows that most recent trips to the U.S. lasted 10 days or less (42% spent 3 to 6 nights and 27% spent 7 to 10 nights) - ***the average length was 10.2 nights away***. July (20%) and August (21%) were the busiest travel months, followed by September (10%), March (8%), and June (7%).

What do Canadian visitors do in the United States?

The activities most often participated in by Canadians on their most recent trip to the U.S. were dining and shopping. Nearly two-thirds reported that they went and took pictures of places they visited. Visiting friends and relatives is also quite common for Canadians, with 39% reporting that was done on their last trip to the U.S. Other activities included:

TABLE 8
ACTIVITIES PARTICIPATED IN WHILE IN THE U.S.

Dining in restaurants	87%
Shopping	84%
Sightseeing in cities	65%
Taking pictures	62%
Sampling local foods	50%
Sunbathing/beach	49%
Sightseeing in countryside	47%
Swimming	47%
Visiting historical places	40%
Visiting friends	39%
Visiting scenic landmarks	37%
Short guided tours	37%

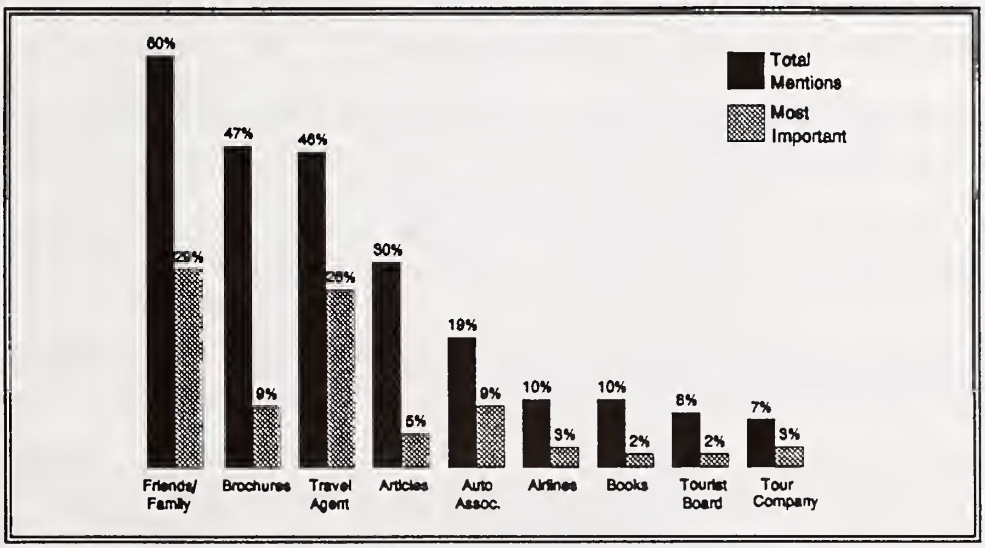
How can potential Canadian travellers be reached most efficiently?

It is important to understand the sources of information Canadian travellers use when planning trips to the United States.

Close to half of Canadians referred to family/friends, brochures or travel agents when planning their U.S. trip. Newspaper/magazine articles were used by nearly one-third of the travellers, while auto clubs were contacted by approximately one-fifth of travellers. Airlines, books, tourist boards and tour companies were mentioned each by 10% or less of the respondents. The single most preferred sources of information were friends/family, and travel agents as Figure 4 illustrates.

Figure 4

PREFERRED SOURCES OF INFORMATION



The newspapers which are read differ greatly by the origin of the reader. Overall, the national paper, The Globe and Mail is read on a regular basis by 21% of the travelling population, followed by The Toronto Star (19%) and La Presse (14%). However individual newspapers in specific cities of origin are extensively read, for example in Toronto, the Toronto Star is read by 74% of travellers.

The leading magazine read is Chatelaine (31%) followed closely by National Geographic (29%), and Maclean's (27%). Canadian Living and Time are read by nearly one-quarter of these travellers.

OVERVIEW OF MARKET SEGMENTS

A series of segmentation analyses were conducted on the data, starting with separate segmentation of travel philosophy, travel benefits, travel products, travel behaviour and recent trip activities, and culminating in a holistic segmentation incorporating all aspects of the investigation. These segmentation analyses are generated using multivariate cluster analysis, which is a means of identifying groups of people who share a common set of beliefs, attitudes or behaviour which differentiate them from other segments of the population.

Four approaches to Travel Philosophy were identified by clustering 24 variables which asked travellers their level of agreement or disagreement with various statements, concerning their approach to travel. Travellers with common responses to statements such as "I like to have all my travel arrangements made before I start on a vacation" and "I usually choose vacation places where I have been before" were grouped in the following four segments:

- **ORGANIZED & FAMILIAR** (18%); people who like organized trips to familiar destinations;
- **ORGANIZED VARIETY** (29%); people who like group tours and packages, but to a variety of destinations;
- **INDEPENDENT VARIETY** (29%); they like to make their own arrangements to a variety of places;
- **FAMILIAR INDEPENDENT** (24%); they also make their own arrangements, but to familiar destinations.

Travel Benefits sought in a vacation can be used to segment Canadian travellers into four groups. Travel Benefit segments were derived by clustering 32 variables which assessed the importance travellers attached to statements such as "Escaping the ordinary" and "Visiting places my family came from". The four segments are:

- **PLAYERS** (24%), who like to participate in sports and games and who seek luxury and leisure;
- **BREAK AWAY** (25%), who want to escape from ordinary routine on a vacation;
- **KNOWLEDGE SEEKERS** (30%), who want to learn on a vacation by trying new things;
- **SOCIAL TRAVELLERS** (20%), whose primary motivation for travelling is to see family and friends.

Travel Product segments were based on 57 variables. These included very specific activities such as "Fishing" and "Live theatre and concerts". Travel product segments can be identified in five groups:

- **WILDERNESS/OUTDOOR RECREATION** (19%), who enjoy all kinds of outdoor and wilderness activities;
- **INDIGENOUS CULTURE** travellers (16%), who want to explore cultures native to a particular area to increase their knowledge and broaden their horizons;
- **DEVELOPED AMENITIES** (24%); these people want a high comfort level, in a city or resort with many amenities;
- **SPORTS, SUN AND SAND** (22%); they want physical activities associated with the beach/water;
- **SUN AND SERVICES** (19%); these people want a warm sunny destination where they can shop (not just lie on the beach).

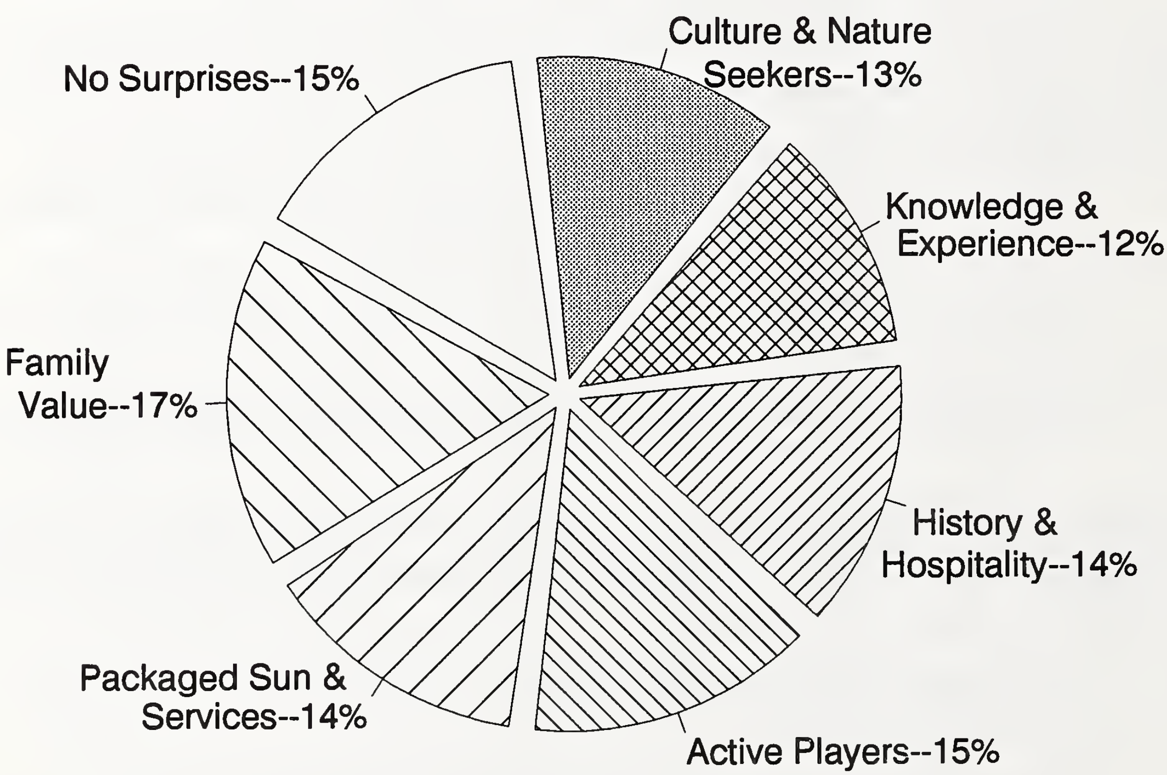
Travel Behaviour segments split into three groups based on intention to visit, actual visitation and frequency of travelling:

- **ACTIVE NORTH AMERICA** (14% of travellers) travel fairly often, particularly to the U.S.; they account for 20% of all outbound travel.
- **ACTIVE INTERNATIONAL** (21% of travellers but 36% of all trips taken), primarily to off-shore destinations;
- **INFREQUENT CLOSE-TO-HOME** travellers are the largest group (65%), but they account for less than one-half of all trips (43%), most of them to border destinations.

Travellers were also segmented into four groups based on Recent Trip Activities. A total of 42 variables were combined from actual activities travellers participated in on their last pleasure trip of three nights or more. The segments are:

- **DO ALL/SEE ALL** segment (16%), who participated in more activities than the rest of the travellers combined.
- **ACTIVE NATURE** segment (20%), who primarily did outdoor activities;
- **FUN AND SUN** travellers (28%), who went to a beach, sun tanned and sampled the nightlife;
- **INACTIVE** travellers (37%), who had the lowest activity levels of any group, except for high visitation to friends and relatives.

FIGURE 5
HOLISTIC SEGMENTS OF THE CANADIAN PLEASURE TRAVEL MARKET



The Holistic Segmentation incorporated attitudinal differences across each of the previous segmentation types: travel philosophy, travel benefits, travel products, travel behaviour and travel activities. The holistic segmentation also includes how travellers feel about lifestyle or psychographic dimensions. This segmentation approach links the attitudes, preferences and behaviour patterns of individuals into a coherent and consistent whole. A total of 162 variables were used to create this segmentation, resulting in seven distinct holistic segments:

- **CULTURE AND NATURE SEEKERS** (13%); primarily outdoor/wilderness travellers who like to travel independently to inexpensive places where they can enjoy local culture and nature. Their confidence and independent nature allows them to explore destinations which other travellers may hesitate to visit.

- **KNOWLEDGE AND EXPERIENCE** travellers (12%) are also interested in cultural experiences, but usually of a more *"civilized"* or urbanized variety - they yearn to learn about new and different aspects of life but are not very interested in forests and parks. European destinations hold considerable appeal for these people.

- **HISTORY AND HOSPITALITY** travellers (14%) are most interested in sampling local history through group tours where they can be assured of convenience, safety and hospitable surroundings. Packaging of vacations is important to these people, since they try to avoid risks of any sort and enjoy travelling in a group.

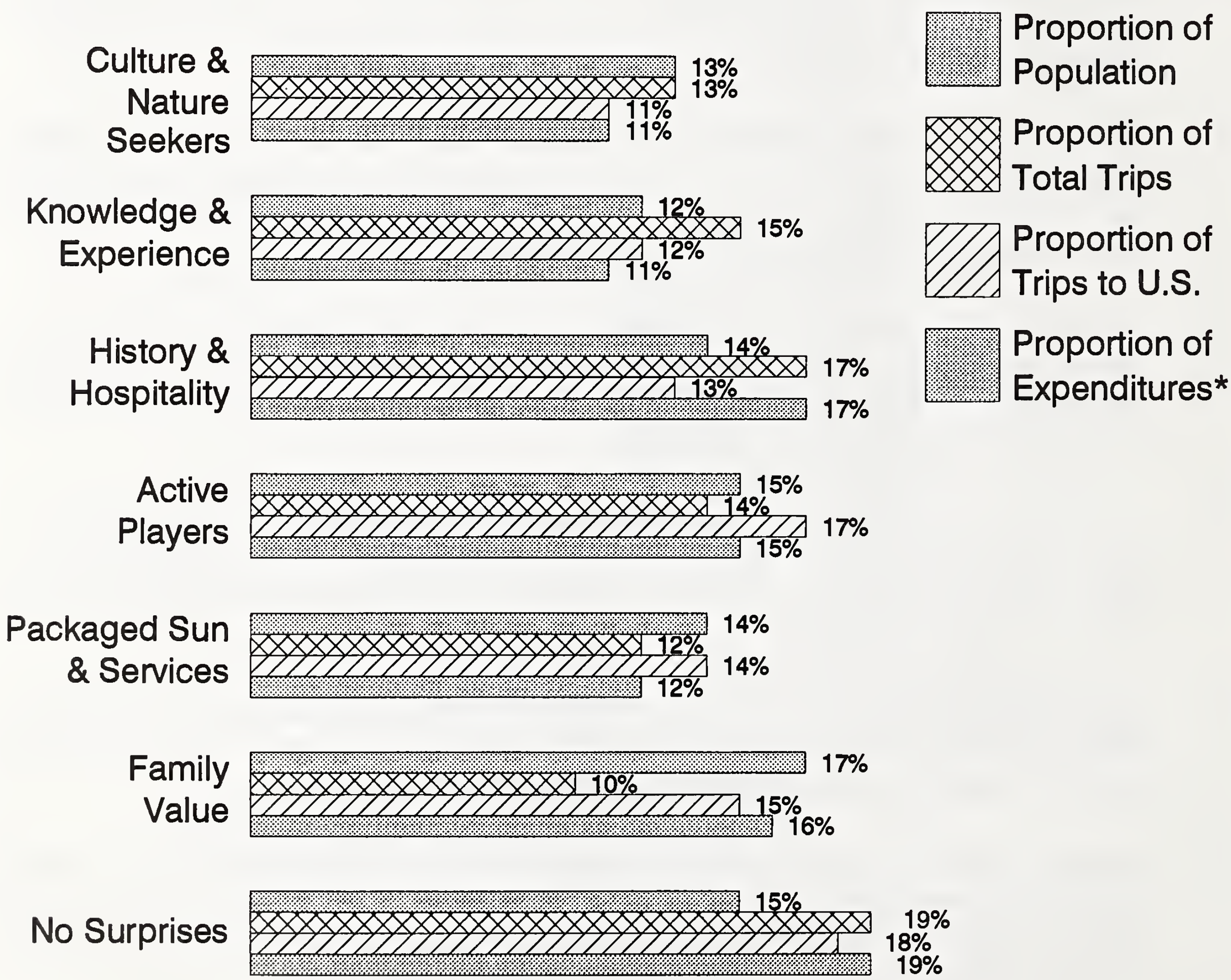
- **ACTIVE PLAYERS** (15%) are interested in games of all types, from sports (watching or participating) to gaming/gambling. They have a pre-disposition toward luxury, and like to travel in style, and indulge themselves. They are outgoing, active people who want to do and see many things on a vacation.

- **PACKAGED SUN AND SERVICES** travellers (14%) enjoy vacations in the sun on a beach, arranged by someone else, which are all-inclusive. They go on a vacation to escape from their ordinary routine and to socialize with the locals and do a bit of shopping.

- **FAMILY VALUE** (17%) travellers are most motivated by family considerations, seeking predictable lower priced accommodation and arrangements. Activities the family can enjoy (like theme parks) are important to them, as long as they perceive they are getting good value, in a safe setting.

- **NO SURPRISES** travellers (15%) are very risk averse, preferring to have all arrangements settled before embarking on a trip, and avoiding changes in schedule or location upon arrival. Whereas some segments seek variety and activity on a vacation, these people want predictability and little activity, with the exception of golf.

FIGURE 6
MARKET SIZE AND TRAVEL POTENTIAL OF HOLISTIC SEGMENTS OF THE CANADIAN OUTBOUND TRAVEL MARKET



Note: Proportion of travel based on % of total trips of each segment in past 3 years.

* $50 Cdn. x # of nights x # of people in segment ($50 Cdn. average derived from Tourism Canada 1991)

Exploring the Holistic Segments

Total market potential for each of the segments can be analyzed according to the proportion of travel which each segment accounts for, the proportion of U.S. travel by segment, and the estimated amount of expenditures (based upon average daily spending times the number of nights stayed, proportionate to the actual size of that segment). Based upon these methods of assessing market potential, some of the most important segments in relation to U.S. travel are "Active Players", "No Surprises", "Family Value", and "History & Hospitality" travellers. "Active Players", more than any segment, like the U.S. as a travel destination. The "No Surprises" segment accounts for almost one-out-of-five total trips taken outside of Canada, but most of those are in the United States. The "Family Value" segment does not travel as frequently as many of the other segments, but when they do, they tend to stay longer, and they also travel in the U.S. a great deal. The "History and Hospitality" segment accounts for a fairly large share of total estimated money spent in the U.S. because of their longer than average stays and may offer some potential for specific U.S. destinations (see Figure 6 and Table 9).

TABLE 9
ESTIMATED SHARE OF EXPENDITURES OF HOLISTIC SEGMENTS BASED ON AVERAGE NIGHTS STAYED & AVERAGE EXPENDITURES ON RECENT TRIP TO U.S.

	Proportion of Population of Outbound Travellers	Average Nights Stayed on Recent U.S. Trip *	Total Estimated Expenditure (Based on $50/day)**	Proportionate Share of Total Estimated Money Spent in U.S.
SEGMENT	(%)	(Mean)	($000 - Cdn)	(%)
Culture and Nature Seekers	13	9.8	630,612	11
Knowledge and Experience	12	9.3	552,404	11
History and Hospitality	14	12.6	873,155	17
Active Players	15	9.1	675,656	15
Packaged Sun and Services	14	8.5	589,033	12
Family Value	17	11.0	925,624	16
No Surprises	15	10.7	794,453	19
TOTAL OUTBOUND TRAVELLERS WHO VISITED U.S.	100	10.2	$5.05 Billion***	100.0

* *Trip of 3+ nights for pleasure.*
** *Average derived by Tourism Canada, 1991 ($50 Cdn. x # of nights x # of people in segment)*
*** *Projected to population, a total of 9,899,720 Canadians took their most recent trip to the U.S., spending a total of $5.05 billion. (74% of outbound travellers x 10.2 nights x $50 Cdn. per)*

Holistic segments can also be examined by all of the data collected, including region of origin. Across the provinces some of the major differences include:

- a higher concentration of "Culture and Nature Seekers" in British Columbia;
- a greater proportion of "Active Players" in Alberta, Manitoba and Saskatchewan; and
- a higher proportion of "Knowledge and Experience" travellers and "Packaged Sun and Services" travellers in Quebec.

TABLE 10
PROFILE OF CANADIAN OUTBOUND HOLISTIC TRAVEL SEGMENTS BY PROVINCE OF ORIGIN

HOLISTIC SEGMENTS	Total Outbound (3450) %	B.C. (393) %	Alberta (335) %	Man./ Sask. (300) %	Ontario (1187) %	Quebec (853) %	Atlantic (298) %
Culture and Nature Seekers	13	20	16	11	12	11	13
Knowledge and Experience	12	13	11	8	13	19	11
History and Hospitality	14	16	12	12	16	7	14
Active Players	15	16	21	21	14	13	14
Packaged Sun and Services	14	8	9	8	13	26	13
Family Value	17	13	19	27	14	8	19
No Surprises	15	14	12	14	17	16	15

Consistent with the product interests and motivations of each of the holistic segments, there are some major differences in terms of states visited, such as:

- *"Culture and Nature Seekers"* are more likely to have visited states such as Maine, Vermont, and Washington which all have considerable natural scenery.
- *"Knowledge and Experience"* travellers are more likely than other segments to have visited California and Massachusetts.
- *"History and Hospitality"* travellers are more likely to have visited New York than other segments.
- *"Active Players"* are more likely than others to have visited Nevada.
- *"Packaged Sun and Services"* travellers are most likely to have visited Florida, New York and Maine.
- *"Family Value"* travellers are more likely to have visited border states such as Washington and Michigan than most segments.
- The *"No Surprises"* segment is ***more interested*** in Florida and Nevada than other segments.

Print media usage differs widely by holistic segments; to target "Culture and Nature Seekers", they read The Globe and Mail, The Vancouver Sun and geographic magazines (National Geographic, Canadian Geographic, and Equinox) more than other segments. The "Knowledge and Experience" travellers are more likely to read The Globe and Mail, La Presse and Le Devoir (since they are more likely to reside in Quebec). The "History and Hospitality" travellers are more likely to read The Toronto Star, and Canadian Living. "Active Players" are more likely to read sports oriented magazines and newspapers. "Packaged Sun and Services" travellers read less newspapers and magazines than other groups, however they opt for lifestyle oriented magazines such as Chatelaine and L'Actualite.

INFORMATION AVAILABLE FROM THE RESEARCH

The data collected can be used to answer a variety of questions about Canadian outbound travel and travellers in each market. These and other questions can be answered in the detailed country report, standard computer tabulations, and database diskettes that are available separately.

How many Canadian outbound travellers are there?	- basic estimates of incidence and size of market (total and by province)
Who are Canadian outbound travellers?	- basic demographics - sex - age - self-employment and occupation - education - household income - marital status - household size - number of children - close friends/family in the U.S.
Where do travellers go on outbound trips?	- destination of most recent outbound trip - specific destinations in the U.S. - ever visited and visited in the past three years - intend to visit specific destination in next 2 years
How did they plan and prepare for their trips?	- sources of planning information used - when destination was decided - when trip was booked - with whom trip was booked
Who did they travel with?	- number of adults - number of children - their relationship to the traveller
When did they travel?	- month/season of trip - number of nights away
How did they travel?	- whether a package trip and, if so, what was included in the package - modes of transportation used within the U.S. and getting to the U.S. - use of charter flights

What did they do on their trip?	- main purpose of trip - activities taken part in
What do people think about travel and how do they prefer going about it?	- attitudes on 25 travel philosophy statements
How do people think about life and personal philosophy?	- attitudes on 15 life philosophy statements
How satisfied were they with their most recent trip?	- how satisfied they were with the destination - likelihood to revisit - likelihood to recommend it
In general, what reasons do people have for wanting to travel and what experiences are they looking for?	- attitudes on 32 travel benefit statements
What features, activities and facilities are important in the selection of vacation destinations?	- importance ratings of 57 different product items
Where would people like to go on a vacation?	- preferred destinations outside of Canada.
Where would people like to travel in the U.S.?	- likelihood to visit in next 2 years - U.S. destinations of most, second most and third most interest - preferred destinations in the U.S. at the state/city level - likelihood to visit in next 5 years
What vacation destinations in North America are travellers aware of?	- destinations in the U.S. that come to mind as places to take a vacation
What are the perceived strengths and weaknesses of the U.S. as a vacation destination?	- specific ratings of the U.S. on 34 different product attributes
How can travellers be reached through the media?	- readership of daily newspapers - readership of weekly and monthly magazines - ownership of satellite dish - cable T.V. with/without U.S. commercials

The above represent a number of general questions which would be of broad interest to a variety of marketers in the travel industry. Individual users of the data, however, are likely to have specific questions more directly related to their particular situation. The flexibility certainly exists in the database to answer many of these specific questions. Some examples of how individual users of the information might approach the analysis of their data are provided in the next section.

INDIVIDUAL USER APPROACHES

As an individual user of the data, how can I optimize my use of the results?
The results shown in this highlights report provide an indication of the large amount of data available from this study, as well as at least one approach that might be used in analyzing the results. In order to optimize the utility of the information, however, individual users of the data would likely need to adopt specific approaches.

One basic strategy in analyzing the results would be to identify a particular target group of interest and to attempt to discover as much as possible about that group. Having identified that group it would be possible to reveal their demographics, attitudes towards travel, perceptions to the U.S., holistic segment, media readership, and so on. This detailed information would be obtainable from either the computer tabulations, written/graphic analysis, or the database diskettes that have been made available from this study.

In terms of identifying the appropriate target market for an individual user, there are a number of alternatives that could be employed. For example, a provincial, state, or city tourism authority could look at travellers who either expressed an interest in or who actually visited their destination.

Developers of particular products would have several alternatives. For example, a luxury hotel developer could look specifically at travellers who identified first class hotels as being important to them. Alternately, product segments such as the "History & Hospitality" group (who expressed interest in a *"bundle"* of product features such as guided tours, local history, and Bed & Breakfast) could be used as a starting point.

As another example, a marketer of gaming packages would be able to analyze either people who identified gaming as being important to them, people who actually gambled on a trip to the U.S., or a product segment such as the "Active Players" group who have an interest in gaming along with a variety of other sports activities. On the package side, such an analysis could examine travellers who actually travelled on packages, or who showed a general inclination towards package vacations by expressing a package travel philosophy.

There are any number of target segments that could be analyzed from the data (e.g. golfers, theatre-goers, hikers, sightseers, car renters, adventure travellers, older travellers, and so on). It would even be possible to combine some of these categories in order to look at adventure package travellers, for example, or skiing package travellers.

It is the purpose of this report to make readers aware of the great wealth of data available, to highlight the number of potential uses of the data, and thereby to encourage its follow-up by the travel industry.

U.S. G.P.O.;1992-311-896:60528

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